



13 Sep.2019

## INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,983	(0.5) %	(5.9) %
BSE SENSEX	37,104	(0.4) %	(4.5) %
CNX BANK	27,819	0.2 %	(8.3) %
CNX MIDCAP	15,883	(0.4) %	(13.4) %
CNX SMALLCAP	5,578	0.3 %	(17.2) %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	27,182	0.2 %	16.5 %
S&P 500	3,010	0.3 %	20.1 %
FTSE 100	7,345	0.1 %	9.1 %
HANG SENG	27,159	1.8 %	8.1 %
NIKKEI	21,760	0.8 %	11.2 %
SHANGHAI COMPOSITE	3,031	0.8 %	23.0 %

## FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	71.58	(0.3) %	3.1 %
EUR/USD	1.10	(0.2) %	(3.8) %
GBP/USD	1.23	0.4 %	(3.2) %
USD/JPY	107.75	0.9 %	(1.7) %
USD/AUD	1.46	(0.7) %	2.5 %
USD/SGD	1.38	(0.3) %	1.1 %

## COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	55	(2.1) %	18.0 %
Gold(INR/10g)	37,669	(0.6) %	19.5 %
Gold Comex(USD/oz)	89	(94.1) %	(93.1) %
SILVER(INR/1Kg)	46,601	(0.5) %	21.8 %
Aluminium(USD/MT)	1,774	(1.0) %	(4.5) %
Copper(USD/MT)	5,843	1.3 %	0.1 %

## FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	1.5	0.0 %	(1.1) %

**Global Economy:** The US Labor Department said its consumer price index inched up by 0.1% in August after rising by 0.3% in July. European Central Bank has announced a new stimulus package, in an attempt to boost growth in the Eurozone. The bank cut its deposit rate, charged on commercial bank deposits at the ECB, by 10 basis points to a new all-time low of minus -0.5%. The ECB's governing council has also decided to leave its benchmark interest rate at zero percent. The ECB is also restarting its quantitative easing programme, and will start buying Euro 20 billion of bonds each month from the start of November. Eurozone's industrial production continued to decline in July, preliminary figures from Eurostat showed on Thursday. Industrial production dropped 2% year-on-year following a 2.4% slump in June, which was revised from 2.6 IFO stated that German GDP will fall by 0.1% in July-September, for the second quarter in a row. IFO also cut its growth forecast for 2019 to just 0.5%, from 0.6% earlier. Germany's inflation eased as estimated in August, final data from Destatis showed Thursday. Consumer prices climbed 1.4% year-on-year in August, slower than the 1.7% increase in July. UK property sales are expected to fall over the next three months as Brexit uncertainty continues to drag sentiment, data from the Royal Institution of Chartered Surveyors showed. The index for expected sales volume for the coming three months declined to -23 in August from -4 in July. Japan core machine orders were down a seasonally adjusted 6.6% on month in July. On a yearly basis, core machine orders rose 0.3% following the 12.5% gain in the previous month. Japan producer prices were down 0.3% on month in August, the Bank of Japan said on Thursday following the flat reading in July. On a yearly basis, producer prices sank 0.9% following the 0.6% decline in the previous month.

**Global Equities:** Hopes of easing trade war between the US and China and easy monetary policy supported the sentiments.

**Indian Economy:** India's retail inflation rate in August grew 3.21%, rising from July's 3.15%. August CPI food price inflation came in at 2.99%. Industrial production rose by 4.3% in July compared to 2% in June. First-year premium income of the life insurance sector surged 26.4% to Rs 23554.97 crore in July 2019. The private life insurers reported 16.7% surge in the premium collection at Rs 6440.65 crore, while Life Insurance Corporation (LIC) also showed 30.4% jumped to Rs 17114.32 crore in July 2019.

**Equity Markets:** Key equity benchmarks corrected on Thursday after latest rising spree, amid selling in auto and IT shares. S&P BSE Sensex fell 176.61 points or 0.47% to 37,094.21, as per the provisional closing data. The Nifty 50 index fell 55.55 points or 0.5% to 10,980.15, as per the provisional closing data. Nifty snapped its five-day rising streak. Selling in the final hour of the trade dragged the index below the crucial 11,000 mark.

**Corporate News:** Dr Reddy's Laboratories said that the company has received an EIR from the US FDA indicating closure of this audit of its formulations manufacturing plants at Duvvada, Visakhapatnam, which was completed on 21 June 2019. L&T Finance Holdings said that the meeting of the Board of Directors of the company is scheduled on 17 September 2019, to consider and approve raising of funds through proposed issue aggregating up to Rs 150 crore and determine the issue price.



### FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	80.6	(120.5)	(3.3)
MF(INR cr)	664.3	645.8	396.0

### MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	35,011	32,306	34,344
F&O(INR cr)	2,481,445	1,463,497	1,301,703

### MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	14.2	16.3	15.6
NSE VIX	14.9	16.4	17.6

### NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	27,819	0.2 %	(8.3) %	Energy	14,405	(1.2) %	(12.9) %
IT	15,583	(0.8) %	(1.6) %	Pharma	8,102	0.2 %	(13.6) %
Metals	2,411	(0.2) %	(22.3) %	Finance	12,422	0.3 %	(0.6) %
Auto	7,284	(1.9) %	(13.4) %	PSU	2,506	0.4 %	(26.0) %
FMCG	28,575	(0.6) %	(5.4) %	Real Estate	264	(0.9) %	(1.1) %

### NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Indiabulls	449	4.2 %	(47.0) %	Yes Bank	68	(5.1) %	(75.4) %
Interglobe	1,723	3.5 %	21.6 %	Tata Motor	128	(4.8) %	(31.7) %
UltraTech	4,002	2.5 %	(1.3) %	Tata Motor	59	(4.5) %	(36.4) %
Bank of Ba	101	2.1 %	(23.8) %	Vodafone I	6	(3.5) %	(68.7) %
ICICI Bank	403	2.1 %	1.1 %	Bosch	13,760	(3.4) %	(24.0) %

### EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
<b>No Data Found</b>					

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